

Joint Base Myer-Henderson Hall Tax Center

WHAT TO BRING TO YOUR APPOINTMENT

In order for the JBM-HH Tax Center to provide the most efficient service possible, eligible customers **MUST** bring the following documents to their appointment:

EVERYONE must bring their **military ID** AND their **social security card**. You must also bring ID verification AND the social security card for **EVERY PERSON you will claim on your return** (spouse and any other dependents).

IF APPLICABLE, you must also bring the following documents:

1. All income statements
 - IRS Form W-2 (Wages and Salaries)
 - Tip income, if not already reported on IRS Form W-2
 - IRS Form 1099-R (IRA, Pension, or Retirement Distributions)
 - IRS Form 1099-INT (Interest Income)
 - IRS Form 1099-DIV (Dividends)
 - IRS Form 1099-MISC (Miscellaneous Income)
 - IRS Form 1099-B (Proceeds from Broker and Barter Exchange (Capital Gains)) – limited to ten transactions!
 - IRS Form SSA-1099 (Social Security Benefits)
 - IRS Form W-2G (Gambling Winnings)
 - IRS Form 1099-K (ONLY ACCEPTED FOR UBER DRIVERS WHO ARE ACTIVE DUTY MILITARY)
 - IRS Form 1099-S (Proceeds from Real Estate Transactions)
 - Must also provide date of purchase, selling expenses, and adjusted basis for home sold
 - IRS Form 1099-Q (Payments from Qualified Education Programs)
2. Copy of your last tax return filed
3. Orders to active duty for more than 29 days if National Guard or Reserve
4. Power of Attorney or IRS Form 2848 if filing jointly and spouse is not present for appointment
5. Copy of last Leave and Earnings Statement or paycheck stub
6. Bank routing and account information for direct deposit refunds. A voided check is preferable to ensure accuracy of information.
7. All deductible expense statements
 - a. Mortgage interest statements (IRS Form 1098)
 - b. Tuition statements (IRS Form 1098-T)
 - c. Student loan interest (IRS Form 1098-E)
 - d. Childcare EIN and childcare expenses receipts
 - e. Charitable donations
 - f. State taxes paid from last year's return
 - g. Traditional and ROTH IRA Contribution amounts
 - h. Education expenses
 - i. Personal Property tax receipts
8. Child support, spousal support, or alimony court orders